

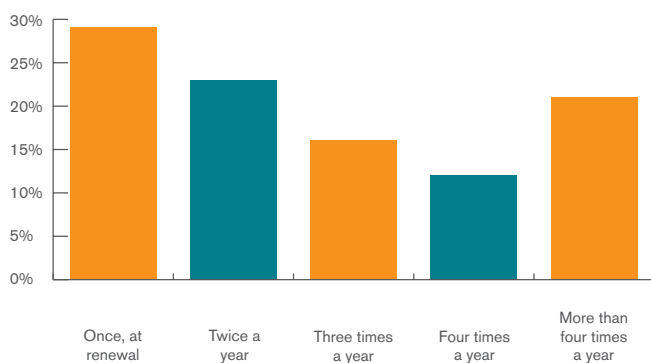
# Are you clicking with your customers?

Ecclesiastical commissioned the research company, FWD, to hear the views of brokers across the UK about their contact with customers. We wanted to understand how brokers connect with their customers, how often and what the blockers are.

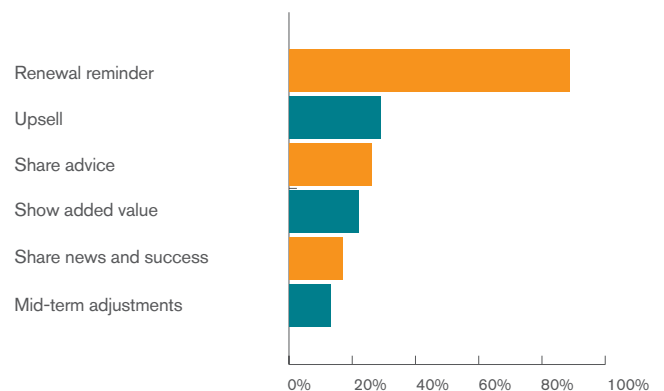
We surveyed 250 brokers in March of 2017 to delve deeper into how, when and why they interact with clients.

## Contacting customers

### How often do you speak to your customers?



### Why do you contact your customers?



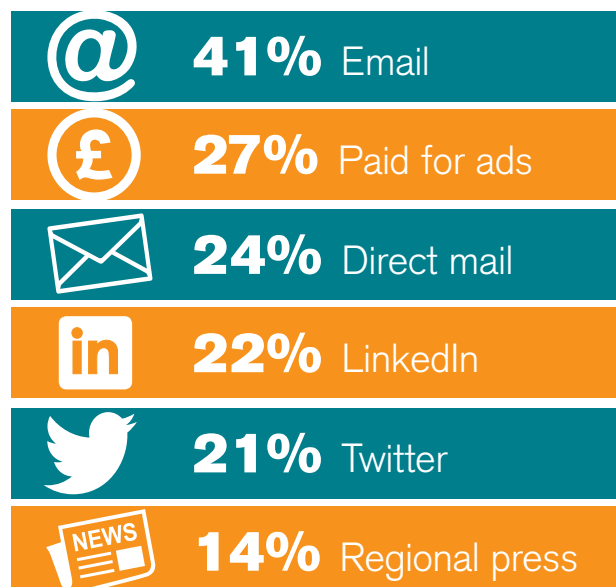
What became clear is that in some cases, brokers are not in regular contact with their customers. Over a third of smaller brokers told us they only contact their customers at renewal time. While the vast majority, a total of 94% of brokers, contact customers with renewal reminders, just 29% contact them to offer an additional product or upsell. Over half only contact customers once or twice a year.

“ **41%**

of brokers used email marketing for the first time last year ”



### Have you chosen new ways to talk to your customers in the last year?

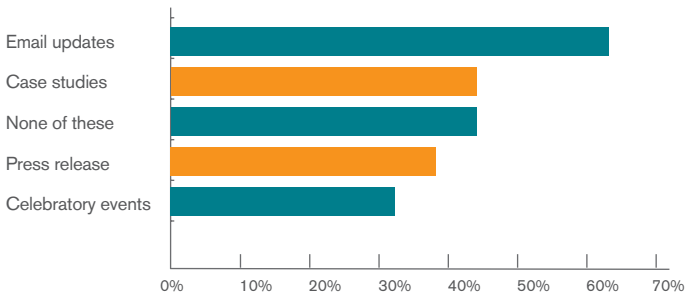


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## Engaging customers

### How do you share good news or business success with your stakeholders?



“ Only **17%** of brokers contact customers to share business successes ”

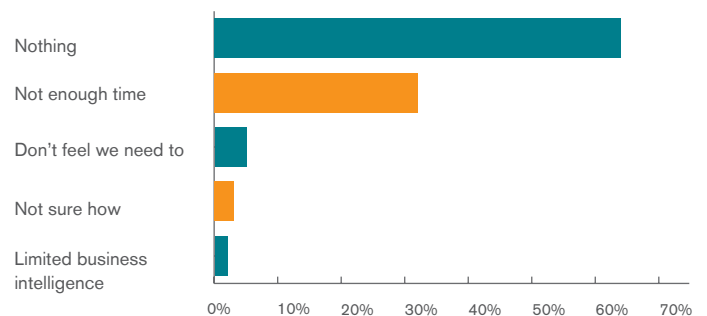


We learned that the uptake of social media use is still at an early stage among many brokers. Just 22% have used LinkedIn for the first time in the last 12 months and only 21% have adopted Twitter. And while 30% of brokers put case studies on their own websites according to our research, only 5% are signposting customers to this information on social media.

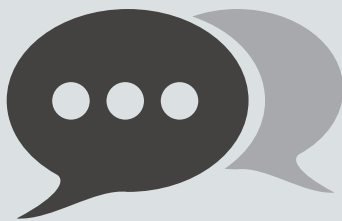
### How do you currently get to know your customers better?



### What is stopping you from getting to know your customers better?



“ **49%** of brokers don't ask their customers for feedback ”



“ **32%** of brokers do not have enough time or people to dedicate to relationship building ”

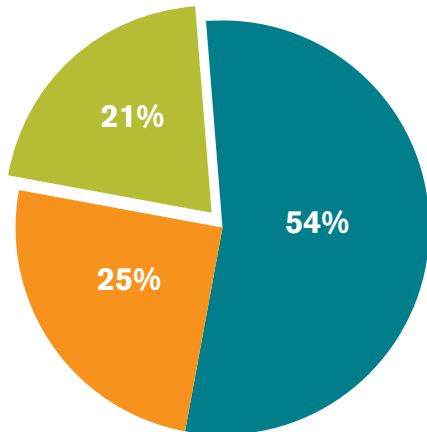


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## Contacting under 30s

### How important do you think it is for your business to engage with the under 30s?



- Thumbs up - we want to do more!
- We already do enough
- It is not a priority for us

### If you're not actively targeting the under 30s, why not?

**48%** Our clients are 45+

**20%** We don't target specific age groups

**24%** Under 30s are less likely to be exposed to big risks

**22%** Our insurance is not relevant

**21%** They are on the radar but we don't know how to engage with them

We know that the age profile of people buying insurance is not confined to older people, and the success of young entrepreneurs, celebrities and artists means that the under 30s are a growing demographic in need of insurance cover. This is particularly true in the High Net Worth and Mid Net Worth market, yet brokers find it difficult to engage this part of the market and 29% of brokers need help reaching them via social media.

### What support would you need from an insurance partner to target the under 30s?

**53%**

None



**29%**

Help with social media



**23%**

Help to change their view of brokers



**20%**

Help us understand what makes them tick



### In summary

So what does all of this tell us? The first tweet was sent over 10 years ago, yet many in our sector have not embraced social media. Whether it's face to face, via email, over the phone or over a social network, there are lots of opportunities for more dynamic and engaging conversations – to better click with customers. Pick a customer – what's your next conversation with them going to be?

### Want more industry insight?

If you would like to see more information please visit -

[www.ecclesiastical.com/thedifference](http://www.ecclesiastical.com/thedifference)

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